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ABSTRACT

Intended for early childhood teachers and supervisors, this booklet describes and illustrates a comprehensive recordkeeping system that is based on written observations. The full recordkeeping system includes daily classroom observational notes, monthly cumulative summaries, checklists, monthly plans, and bi-yearly progress reports. Daily notes and cumulative summaries are the basis for individualized planning. The cumulative record, a synthesis of previous observations and plans, is the basis for parent conferences and written reports. The recording system guides staff in making daily observational notes and anecdotal records, cumulative summaries, full class conceptual and skill charts, individualized plans, progress reports, and work folders. The reporting system aids staff in summarizing and evaluating parent/teacher conferences and writing reports to schools, agencies, and parents. Illustrations of behavior records, cumulative records, skill and concept charts, monthly plans, progress reports, conference summary, conference evaluation, parent reports, school reports, and faculty memos are provided. (RH)

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Recording & Reporting:

a comprehensive early childhood recordkeeping system

PS 015273

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By MARLENE BARRON

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The substance of this booklet is based on two articles originally published in the early 1980s in The Constructive Triangle Magazine, American Montessori Society, 150 Fifth Avenue, New York, NY 10011.

The clarity and simplicity of the procedures in this recording and reporting system stem from the teachers' continued insistence on an easy to understand, efficient, adaptable, integrated set of procedures. Their feedback was invaluable.

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Introduction

All observations are selective. What we see, what we pay attention to and what we remember is determined by our past experiences and by our conscious and unconscious expectations. Each observation is filtered through our psycho-social history and, consequently, idiosyncratically interpreted. We see only what our experiences allow us to see and we remember even less. Within 24 hours the memory of the details surrounding most events has become so distorted that it cannot be construed as accurate bits of information. Teachers who rely on *memory* for planning and reporting data are creating a fiction for themselves and their students. It takes a great deal of awareness and training to see what is really happening. The tasks of observing, recording and reporting on children's behavior are fraught with difficulties.

Those of us in early childhood education understand that the key to creating a well run classroom is observation. Curricula design and management strategies must be based on an informed, thoughtful process, not just on the adult's intuition which oft times can be misleading. Documentation of *what* children are doing, *how* they are using the materials (patterns of behavior) and *with whom* they are interacting is the basis for evaluation and change. Since we see only what we want to see and remember only a select part of what we see, it is crucial for teachers to learn to record their observations immediately and purposefully and to evaluate and plan accordingly.

With these "caveats" in mind, I have developed a comprehensive recordkeeping and reporting system complete with forms, memos and outlines; a system developed and refined with teachers over the past two decades.

My continuing goal was to create a simple, flexible and easy to maintain system which would be directly useful both to teachers and to supervisors and which was based on daily *written* observations. A system which used these written daily records as the basis for the child's cumulative records and for individualized, monthly plans. The monthly focus on each child is integral to this system. Every child deserves to have his/her ongoing school experiences evaluated and planned for systemat-

ically. To do this on a weekly basis is not logistically possible or recommended; however, on the early childhood level a monthly review and update provides distance and opportunity for change and is manageable by the teacher.

The full recordkeeping system includes *daily* classroom observational notes, monthly cumulative summaries, check lists, plans and biyearly progress reports. The *daily* notes and cumulative summaries are the basis for individualized planning in the physical, social, emotional and cognitive areas. The cumulative record, a synthesis of previous observations and plans, is the basis for parent conferences and written reports.

The dissemination of information whether in written or verbal form is a skill few teachers have mastered, having received little or no training in *interviewing* techniques or in report writing. Thus the conference format and reporting procedures which flow out of the recordkeeping system have been designed for ease of execution.

The full recordkeeping and reporting system is composed of:

A. RECORDING
   1. Daily observational notes and anecdotal records
   2. Cumulative summaries
   3. Class conceptual and skill charts, eg. perceptual (visual and auditory), math areas.
   4. Individualized plans
   5. Progress Reports
   6. Work folders

B. REPORTING
   1. Conferences
      a. Conference Summary Form
      b. Conference Evaluation Form
   2. Written reports
      a. School to School
      b. School to Agency
      c. School to Parents

Recording

1. DAILY OBSERVATIONAL NOTES

These are ongoing daily behavioral records of each child's activity and social interactions (sociograms). **Behavioral records describe behavior;** they do not impugn motive to the behavior. For example, "a child laughed" is a behavioral description; "a child laughed because another child fell and hurt himself" assigns motive to the laughter and, unless you are a certified mind reader, is at best a guess and probably inaccurate. The child may have laughed out of nervousness or because he thought of a joke; he might not have even seen the other child fall.

When observing the child's *work* behavior, note not only *what* the child is doing, but also *how* the child does it. Look for patterns in a child's manipulation of material. Observations may include handedness, degree of focus on the material, or organization of the items within the activity.

Recording *social interactions*, creating sociograms, helps in the formation of small groups for specific tasks. Children behave differently depending on the makeup of the group. Some children function best in groups where everyone is on the same ability and interest level; some do best in heterogeneous settings. Some groupings function independent from adult help; others flounder without such help.

Procedures *(See FORM #1)*

Set up the system by using a spiral notebook which has more lines than children in the class. Divide the two pages into six sections, one for each day of the week and an extra section for anecdotal records and "*remembered*" observations. The margin at the top of the page can be used to record full group lessons. List the children's names in the left margin, folding each succeeding page like a rollbook.

This format presents a *full week's record of activity*, including social interactional patterns, on the two open pages. This allows the teacher to *read* and *analyze* at a glance a week's worth of activity and peer interactions. Most of us use recordkeeping techniques that force us into making decisions based on small bits of disconnected information instead of presenting us with well organized, significant chunks of data.

Focused observations are typically taken twice during the work/free play period. Note taking at designated times allows patterns to emerge both for individual children and for the class as a whole. First, decide on the time to take the focused notes, eg. 15 minutes into the work period

and 15 minutes before the end of the work period, or the first activity each child selects and the last activity. . . At the selected time, record the time and write down *exactly* what each child is doing, with whom and an evaluation of the child's process.

ANECDOTAL RECORDS *(See FORM #1)*

Anecdotal records are collections of the child's social/emotional response patterns and personal parables. Examples may be—a child draws "dead" people, a black child proclaims he is "white" or a child suddenly refuses to make eye contact. These bits of important information can be recorded on the bottom of the page or in the last column. They can be recorded after class as well as during class.

—FORM #1 — DAILY OBSERVATIONS

	MONDAY	TUESDAY	WEDNESDAY
	OCT. 15 --	OCT. 16	
	⊙ LEAF TRACING 10 A.M. 11:05 A.M.	⊙ "I SPY" 10:15 A.M.	
MARY	SAND — PUZZLE	BLOCKS —	
TOM	HYDROSYN	INITIAL SOUNDS	PUZZLES
DICK	BLOCKS →		
HARRY	DRESS UP	~~~	~~~
ALICE		CRAYONS	
DOLLY	~~~	BOOK	
LESLIE	LEGO →		
JEFF	PUZZLES	COLOR SORTING	
JOSHUA	←	←	
BOB	MAGNETS	WOOD WORKING	
etc.			

Key to Form #1

Code

ng — no good—the child is not using the work appropriately, e.g., when a child has out addition problems and is building with them.

√+ — purposeful, high caliber activity; e.g., a child matching picture cards correctly; the child is ready to move on.

— the child is wandering around the room.

— indicates the passage of time.

— the child is observing the activity of the arrowed child.

Tom (blocks)
Ann — Brackets between two or more children indicate that they are playing together.

Tom (blocks)
Ann — Arrow points to child who clearly is leading/directing the activity.

THURSDAY	FRIDAY	ANECDOTAL RECORDS/NOTES
		ENCOURAGED RELATIONSHIP WITH DOLLY DESIGN MORE CHALLENGING TASKS
		IN DRESS UP - HER "BABY" DIED - MON. HER DADDY DIED - WED.
		BRING IN LEAF PUZZLES

2. CUMULATIVE RECORDS

This individualized monthly record summarizes the previous month's notes from all sources and allows the teacher to chart each child's development in relation to him/herself. This creates, in effect, an individualized time line, a longitudinal record of the child's behavior in class.

Procedures *(See FORM #2)*

At a regular time each week, perhaps each weekend, the records of one-quarter of the children in the class are summarized into their cumulative records. Information is included for each child for the physical, social, emotional, and cognitive areas.

Set up a page for each child in a looseleaf binder with basic information: name, age, home and parent's work phone numbers, other siblings in family, special family or health information and handedness, when known.

—FORM #2 — CUMULATIVE RECORD

Tom Smith
668-1123 (home #) DOB: 9/10/75
444-6811 (pa work #) 2nd yr. in school
parents married; has a new baby sister

Sept. 20: Day 1—Separated from mother after a long hug and a kiss. Immediately went and sat next to Ann (his best friend last
(social) yr.). Also played with a few boys his age (John and Joe) in the block area and playground.

(emotional) Seems confident, independently chose puzzles & small motor activities; completed the activity smiling and singing to himself.

(physical) Learned to skip this summer; is quite proud of this skill and demonstrates for all adults, including visitors. Pencil grip is appropriate—drawings are carefully and colorfully completed. Prints name on unlined paper.

(cognitive) Uses dishwashing, polishings, cooking activities daily; follows sequence; works seriously and in a highly focused manner. Creates and colors in bold, colorful designs with felt-tipped pens.
Knows 1 - 10 (cards and counters)
Can rhyme, sequence picture story and has initial sound concept.

Oct. 20: Was absent one week with a cold and was hesitant in
(emotional) returning to school, cried for a few moments each morning for three days. (possibly a late separation?)

(social) Has continued relationships with John, Joe, and Ann. They sit together when doing art and math games, play lotto, and build in the block area together daily.

(cognitive) Introduced to decimal system 1, 10, 100—beads and cards. Introduced to measurement with unifex cubes.

(physical) Still doing complicated, colorful designs and pictures with felt-tipped pens. Printing is unusually exact and careful. Has not painted.

3. FULL CLASS SKILL AND CONCEPT CHARTS

These scope and sequence inventories are devices that chart each child in relation to his/her peers. You can use commercially designed charts or design your own inventories. If you design your own (which I recommend) be sure to sequence the concepts and skills developmentally.

Procedures *(See FORM #3, pages 16 & 17)*

List the children chronologically with the oldest child at the top of the page. In this way variances from the norm are more easily recognized. Update the information each time a child's cumulative record is being updated.

4. PLANS

A written plan is useful for the new teacher as well as for the highly experienced teacher supervising student teachers. This format enables the teacher to think about and plan for each child in each area. The experienced teacher can use these written plans as a way to communicate information to co-workers and to train student teachers.

Procedures *(See FORM #4, pages 16 & 17)*

The page is set up the same as for the daily observational records. Across the top of the page list your main curriculum categories. In my school they might read: Daily Living, Sensorial, Math, Language Arts, and Other. Other will include large motor, science, social interactions, etc.

As the teacher summarizes and records information in the child's cumulative record and on the class charts, s/he can also plan the next appropriate activity for the child in each area and record the information on this plan page. The planned items may be a focused lesson, it may include encouraging the child to play in the block area or it may include pairing the child up with a likely playmate hoping to develop a mutually satisfying friendship. Propinquity does breed familiarity and friendships.

If a child has successfully mastered the most complicated tasks in an area, it behooves the teacher to plan more challenging activities. Likewise, if no activity in an area seems suitable for the child, more developmentally appropriate items need to be designed. Through focused observation, one can begin to identify and respond to each child's interests. Not everyone is excited about superheroes! The plan may and usually does expand to include grouping a few other children for the new tasks or project. The plan also may assign the development of the items to another team member. A code may be developed so that team members can read the plan, know who is assigned to do what and after working with the child, record the results.

5. PROGRESS REPORTS

If cumulative records are not kept by the school as a part of each child's file, but are kept by each teacher as part of his/her personal records, then progress reports need to be kept. Progress reports summarize the cumulative records and record the child's status in each area as of the date on the report. They are a snapshot of the child's progress as of a specific date. These detailed information sheets can be customized to meet your school's specific needs. They can be used by the teacher or administrator for parent conferences and in writing reports. They are usually done in midyear, December/January, and updated in May/June using a different colored pen. *(See FORM #5, pages 18 & 19)*

6. WORK FOLDERS

Work folders are used to save monthly samples of a child's *scribblings*, tracings, art work, etc. At the end-of-the-year conference the folder can be used to document change and growth and then be given to the parents as is or put together in book form. If children are told that this folder is *saving* their work for the end of the school year, they are more likely to be willing to give up items.

—FORM #3— MATH CONCEPT CHART

NAME	1:1 CORRESPONDENCE	1:MANY CORRESPONDENCE	REVERSIBILITY	SERIATION	VARIABLES	ABI...
TOM	1-5, 6, 7, 8	/	X	X	color shape size X	2 of Them
DICK	1→...	/	X	X	X	4
HARRY	1→...	/	X	X	color shape	2
LESLIE	1→...	/	X	/	texture color	/

KEY

Blank Space = Child does ***not*** have the concept

Code / = Child ***sometimes*** has the concept

Code X = Child ***has*** the concept

—FORM #4— MONTHLY PLANS

	Daily Living	Sensorial	Math
TOM	polishing	decoding extensions	1-9 games
DICK	woodworking	binomial	1-1 A
HARRY			
ALICE			
SALLY			
LESLIE			
JOSHUA			
etc.			

CODE: D = Deirdre; A = Amy

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LITY TO SORT: HOW MANY AT A TIME?	CONSERVATION: CONTINUOUS	CONSERVATION: DISCONTINUOUS	RECOGNIZES NUMERALS	NUMBER: 1-4	NUMBER: 5-9	NUMBER: 0	NUMBER: NUMERAL CORRESPONDENCE
	/	/	1-9 0	X	/	/	1-7
	/	/	1-100	X	X	X	1-100
	/	/	1-20	X	X	X	1-10
	/	/	1-10	X	/	/	1-5

Language Arts	Other
blending D	playdo; hook up with Dick
auditory games A	reinforce ground rules

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—FORM #5 —

PROGRESS REPORT

Date _____

Child's Name _____ Birthdate _____

Teacher _____ Years in School ____

LEARNING STYLE (put an "X" on the scale) .... LOW HIGH

1. Motivation to do appropriate work;
   internal/self motivation (for what areas?) ..... 0/ 5/ /10

   external: how is child motivated?
   by what kind of activity?
   by whom? (friends, teachers?)

	POOR		EXCELLENT
2. Structure (organization) specify:	0/	5/	/10
3. Work cycle (idea/take/do/finish) specify:	0/	5/	/10
4. Independence	DEPENDENT		INDEPENDENT
from peers	0/	5/	/10
from adults	0/	5/	/10
5. Self-confidence (ego strength)	0/	5/	/10

6. Handles frustrations. How?:

SOCIAL BEHAVIOR

1. Peers — parallel play
   leader
   follower
   both when appropriate;
   i.e., gives & takes)

2. Adults — follows directions	0/	5/	/10
relates in formally	0/	5/	/10

3. Handles peer conflicts. How?:

AREAS

Describe what the child does and how s/he does it.

1. Daily living tasks: What s/he does—
   How s/he does it—

2. Small Muscle/Perceptual: What s/he does—
   How s/he does it—

3. Sensorial Material: s/he does—
   Imitates classical presentation?
   Initiates new patterns?

4. Math: What s/he knows—
   What s/he's working on—

5. Language Arts:
   Receptive & expressive—
   Visual—
   What s/he knows—
   Working on—

6. Art: What media used—
   Skills—

7. Science: Units covered—

8. Large Muscle (playground): Problems—
   Proficiencies—

9. Any particular needs—

Reporting

1. CONFERENCES

Traditionally, teachers receive little or no formal training in the goals and techniques involved in conducting conferences. Similarly, parents have no focus or structure when attending a school conference. Both parties enter the conference concerned, nervous, and often guilty about what they have or have not been doing with the child in their respective environments. As a result, teachers and parents assume defensive postures protective of their past experiences and views of the child. The conference often ends in a stalemate with both sides making points on their own behalf and feeling *unheard* by the other side. The child gets lost in the process.

Since the conference is the key tie between the home and school, it is crucial that this time be spent productively and efficiently. Ideally, the teacher should present an accurate picture of the child in class—a description of the child's behavior as a member of a large group (the class). The parents should present a picture of the child at home—this includes an historic, longitudinal description of the child as a member of a small group (the family). Both parties should expect the child to act differently in school than in the home and not be surprised or upset by the differences. Agreement should be reached on what behaviors, if any, need support or help in changing. Recommendations should be made as to how to accomplish the changes and follow-up provided for. This process, which *cannot* be rushed and which in some cases may take many meetings to achieve, supports a climate of trust and openness.

Conference Format Development at the Staten Island Montessori School

As a new school (founded in 1965) with relatively new and inexperienced staff, regularly scheduled conferences were held from the first year. Our goals were not clear although we shared information and, most importantly, reassured parents that our *new* approach was sound educationally and good for their child. In retrospect, it is clear that behavior and interpretations of the behavior were given simultaneously, which led to confusion. Little opportunity was provided for the parents to report on the student's behavior at home, except for specific problems, usually eating or sleeping difficulties. I came to realize that all information was filtered through my value system (Weltenschaung) and consequently was judgmental and rather righteous. Conferences followed a similar format; I talked about what we were doing at school (Montessori Magic) and where we were headed. I superficially interpreted the student's

behavior and usually gave some recommendations for the parents to follow at home. It was important to me that parents like and trust me and view me as a *wise* educator. I have no information on the other teachers' conferences those first years.

During the late 1960s the faculty developed a conference topic outline which teachers attempted to adhere to with little direct supervision, although, as director, I did sit in on difficult or problem conferences. My strong impression from sitting in on these conferences was that teachers were *not listening*; instead, they were very busy protecting themselves and making *smart* points. The parents, on the other hand, often came in afraid and defensive. Their main fear seemed to be that the teachers would tell them that something was *wrong* with their child and it was their fault. Because the conferences were such high anxiety situations all parties involved had selective hearing; they heard the *problems* but did not hear the positives, and they heard the interpretations as fact and as behavior.

During the early 1970's the Staten Island Montessori School was involved in the Human Potential Movement* and with help developed a group conference format. Our basic premise was that raising children entails dealing with developmental issues which occur in *all* families and that by openly sharing concerns, problems, and solutions, parents can get support and help from each other (an early attempt at networking). After a full school meeting at which the new format was explained and questions answered, parents signed up for either the new group format or for the traditional conference.

Each *group* consisted of four to six sets of parents, the teachers and a psychologist who set the ground rules and provided structure and direction when needed. With the whole group present each family, in turn, had their *conference* with the teacher. We met many of our goals: Parents shared ideas and concerns, often felt less anxiety and thus *heard* more clearly when listening to another conference, and some relationships were established between parents.

In a follow-up survey half the parents said they liked the group format and wanted to see it as an option. The parents' main criticism was that they felt they did not get enough time on their own child and that the whole process was too long. For their part, the staff was exhausted from all the training and preparation needed to conduct the groups while the psychologists felt they could not continue to volunteer their time. Because of these time and money factors we ceased to offer the group conference format.

During the late 1970's we continued to struggle with the problem of how to train teachers to conduct efficient conferences; how to help

*I would like to express my appreciation to Dr. George DeLeon, Director of the Center for Learning and Change, and Drs. Harry Wexler and Stan Sachs for their direction and help.

teachers be concise and accurate about the child's behavior while presenting the information in a neutral, non-judgmental manner and with a sensitivity to parental concerns. We wanted to help single, young teachers be more comfortable with older parents, and we needed to train teachers to recognize and speak to the differences between behavior and the interpretations of the behavior.

We had learned that when teachers were prepared with both well-documented, written information on the child and with a structure to the conference, they were relaxed, professional, and more able to keep to their goals.

The following policies and procedures provide the needed structure and guidelines for both teachers and parents.

Parent-Teacher Conferences

Basic Policies to be presented by the Administration.

Conferences are regularly scheduled before the winter break and again in the spring. Conferences may also be called on an *as needed* basis by either the staff or the parents.

Conferences are to be attended by *both* parents regardless of their marital status. This prevents either parent from using (or misusing) information about the child against the other parent and also encourages fathers' involvement in their young child's schooling. This policy also conserves teacher time.

The school should schedule both day and evening conference times. While conferences should usually be held in school, as a last resort go to the parent's home (only if the child is not present) if that is the only way the conference will be held.

The administration should institute and supervise a recordkeeping system to provide the teachers with cumulative written information and a way to record the data developed at the conference.

Teacher Goals

Teachers should strive to present in *everyday language* an accurate, clear description of the child in school and then have the parent confirm each behavior in terms of the child's home behavior.

Since children will act differently at home, the teacher must collect information about the child's behavior out of school.

Parents should be encouraged to enjoy and accept their child as a separate human being. This can be facilitated by helping parents appreciate and respect their child's growth. Parents are not aware of the stages of development in the social, emotional or cognitive areas. No parent should ever feel guilty about their child's behavior.

Parents also need to gain a perspective on their child's behavior in relation to his/her age peers. Most parents have no idea of what is age

appropriate behavior and need this information.

When needed, practical recommendations for changing or reinforcing certain behavior can be developed. Certainly, all healthy parental child rearing practices should be positively acknowledged and supported.

Conference Structure

1. Welcome the parents with a warm, personal sentence. Smile, maintain eye contact and breathe. Start the meeting in a serious yet positive manner.
2. Present an overview your goals; what information will be covered and how the information will be shared. ("After I describe a behavior, I'd like to hear if your child also acts that way at home.")
2. Go through the outline giving behavioral examples and asking for confirmations or disagreements. Everytime a parent says, "Yes, my child does that at home," ask for an example. This is the only way to be sure that the parent truly understands the behavior. Be careful to give examples of appropriate, delightful behavior as well as of problematic behavior. Present a balanced picture of the child.
4. Develop recommendations out of the information. Interpretations may or may not develop out of the information.
5. A follow up procedure, if necessary, should be worked out at this time.
6. Encourage and answer parent questions. At the end of each topic ask, "Do you have any other questions or concerns?"
7. At the end of the conference, summarize the conference in a positive, supportive manner.

A Special List of Do's and Do Not's for Teachers

Do have humility. Even child development specialists do not know everything there is to know about children.

Do not try to emphasize or focus on more than one (at the most, two) important areas or points. Once the parents' anxiety level is raised, the parents (or any adult) develop both selective amnesia and situational deafness. When parents say they were not told about the behavior before, they often mean they did not hear it before. Decide which behavior to discuss first, and be prepared to follow up with further short conferences. Any outline sequence is flexible and can be adjusted to each child's specific needs.

Problematic Conferences

It is often useful to have a neutral party sit in on *difficult* conferences. This person can function as secretary and take notes. At the end of the conference main points of discussion and recommendations can be read out loud for accuracy. A copy of the conference summary form could be mailed to the parents and a copy kept for the files.

Conference Summary Form *(See FORM #6)*

Immediately after the parents leave the conference, use the Conference Summary Form to make notes. This concise form details why and by whom the conference was called, the main points of discussion, recommendations and even has space for the teacher's reaction.

—FORM #6 —

CONFERENCE SUMMARY FORM

for
Teacher-Parent Conferences
Teacher-Consultant Conferences

Child's Name _____

Class _____ Date _____

Parent(s) Attending _____

Teacher(s) Attending _____

Consultant Attending _____

Type of Conference: Regularly scheduled conference _____

Requested by Teacher _____ by Parent _____

Phone Conference _____

Other _____

Any special reason for conference?

Main Points of discussion:

Recommendations or referrals made if any:

Has Consultant observed? ☐ Yes ☐ No

Has Parent observed? ☐ Yes ☐ No

Teachers reaction to conference: ☐ Positive
☐ Negative
☐ Neutral

Conference Evaluation Form *(See FORM #7)*

A way of increasing one's professionalism is to receive, analyze, and then act upon feedback from constituents: Teachers do this all the time with children; we need to do it more with the parents. This form was used successfully by Staten Island Montessori School during the mid 1970s, and the West Side Montessori School during the mid 1980s.

—FORM #7 —

CONFERENCE EVALUATION FORM

Dear Parents

We feel that conferences are a key factor in improving the quality of education for our children. We want these parent-teacher interactions to be as fruitful as possible for all concerned. Over the years we have worked on developing the format to its present stage. Now we want to improve the quality even further. We are asking each parent to fill out the enclosed questionnaire and return it as soon as possible. With this information the faculty will be able to refine our format even further. Remember, the better the communication between home and school, the more the child and parent benefit.

Do not hesitate to be truthful. We want to improve. Only you, our parents, can help us, only with knowledge can we change.

Teacher _____

1 Rate your overall conference

NOT WORTHWHILE					VERY WORTHWHILE
0	1	2	3	4	5

2 Rate your overall length.

TOO LONG					TOO SHORT
0	1	2	3	4	5

3 Evaluate the teacher's conference style.

RAMBLING					FOCUSED
0	1	2	3	4	5
AUTHORITARIAN					RESPONSIVE
0	1	2	3	4	5
FRUSTRATING					HELPFUL
0	1	2	3	4	5
SCARY					REASSURING
0	1	2	3	4	5
TEACHER MONOLOGUE					TEACHER DIALOGUE
0	1	2	3	4	5

	YES	NO
4 Did you get a picture of your child in class?	☐	☐
5 Did you have an opportunity to give a picture of your child at home?	☐	☐
6 Did you ask all the questions you had?	☐	☐
7 Did you get useful recommendations?	☐	☐
8 Did both parents attend?	☐	☐
9 Did you feel it important for both parents to attend?	☐	☐
10 Did you recognize a format to the conference?	☐	☐

11 What was the most important thing you found out at the conference?

_____

12 What changes would you recommend? _____

_____

13 What would you like the conference to focus on? _____

_____

14 Comments _____

_____

2. REPORT WRITING

Written reports should share the flavor of the child while presenting an honest, factual picture of the child as a member of the class.

Reports should contain behavioral descriptions rather than generalizations or interpretations. If a child is described as curious and alert, the words mean little unless *backed up* with specific details and anecdotes.

School To Outside Agency (Diagnostic Purposes) *(See FORM #9)*
In these reports, accurate, behavioral information with detailed examples is critical. Describe positive, appropriate behaviors as well as the problematic behaviors. In other words, present strengths as well as weaknesses. Try and give a *balanced* picture even though you are most concerned with their understanding the child's needs. No child is a 100% ogre; your report will be more trusted and believed when you present a complete picture of the child.

School To Parent Report: End-Of-Year Report *(See FORM #8)*
This can be a concise, one page report sharing the *specialness* of the child. As you describe who the child is at this point in time, refer to the progress and growth the child made during the year. Use clear, everyday English; do not use educational jargon. Parents are interested in reading readiness skills, not in visual perception tracking skills.

—FORM #8 —

PARENT REPORT FORMAT:

Describe—

1. Child's way of learning, way of relating to new ideas and new procedures, way of integrating new material . . .
2. Child's social relationships with peers and with adults.
3. Child's development in curriculum areas.
   - —physical
   - —artistic/creative
   - —cognitive
4. Write a summary paragraph describing the uniqueness of child.

School to School Reports *(See FORM #9)*

These reports need to be particularly precise and concise and, without question, honest. Present information in a positive manner and give examples of typical behavior. What your school may consider an outgoing, assertive child may be an average "holding his/her own" child in another school.

The following report outline is based on a format developed and refined by a group of Heads of Independent Schools in New York City and can be used both for school reports and reports to specialists.

—FORM #9 —

SCHOOL REPORT OUTLINE: EARLY CHILDHOOD LEVEL

1. *Physical Development:* Includes general appearance, general health (Is the child strong? Active? Tire easily? Sick frequently?), motor development, large and small muscle coordination (pencil grip), left or right hand dominance, use of self in space. . .

2. *Intellectual Development:* Conceptual development (relationships, seriation, ability to generalize, one to one corespondence), skill development, memory, length of attention span and interests, language development (vocabulary, fluency and pronunciation, expressive and receptive language, bilingual? English as a second language?). Dramatic play, response to music, use of art materials (scribbling? What does the child draw? What media does s/he use? Never use?). . .

3. *Emotional Behavior:* Includes general temperament, ability to enjoy, self confidence, willingness to take risks, reaction to frustration (in sharing, lack of skill, lack of comprehension), reaction to new experiences. Initial reaction and general daily response to separation from parents, degree of independence (physical and emotional), response to routines, response to directions. . .

4. *Social Behavior:* Includes relationships with teachers, with children, role in the group (a loner? leader?). Does s/he like to do things on own? Does child *need* people to work and play with?. . .

5. *Additional Comments:*

6. *Parents' Relationship With School:* (This area is usually done in conjunction with administration.)

   1. Have you received active cooperation in meeting educational goals and/or problems.

   2. Is there anything outstanding about the parents' involvement with the school?

   3. Are the parents separated or divorced? Is this a single parent? With whom does the child live? What are the arrangements? How does this affect the child in school?

   4. Are there any special concerns about the child's attendance or promptness in arrival and departure?

FACULTY MEMO

Form #10 is an example of an inhouse memo from the Administration to the faculty sent before Spring Vacation. *(See Form #10, page 31).*

—FORM #10 —

FACULTY MEMO

END-OF-THE-YEAR RECORDING AND REPORTING

PROGRESS REPORTS

Update all progress reports using different colored pen. Return all progress reports to the office as a package.

NO progress report needs to be updated if:

1. The child is definitely leaving our school this June ***and***
2. The school report has been written and is in the file.
   A short addendum to the report should be written if:
   —there have been any significant changes made by the child
   —for older children — note where s/he is in math/language arts

TO REPEAT: Progress reports are an in-house sharing of information. They are not necessary for children leaving WSMS who have school reports with an updated addendum.

CONFERENCES:

Start holding end-of-year conferences after Spring Vacation. Encourage parents to observe the class *before* the conference. *BOTH* parents should be present at the conference; when appropriate encourage the parents to invite the housekeeper. Base your conference on the child's cumulative record and progress report.

Use a conference summary form for each conference.
Note: parental attitudes; wants/concerns of the parent

GOAL: specialness of the child
who the child is TODAY with reference to the growth the child made this past year.
share the information with the parent in normal language; no educational jargon!

FORMAT: talk or write about —

1. child's learning style; way of relating to material
2. social relationships with peers and adults
3. activities: a. physical—when appropriate b. artistic c. cognitive
4. summary sentence/uniqueness

In each area, discuss the emotional aspects.

END-OF-THE-YEAR REPORT

This concise, one page report is to be offered to all parents and to be done for everyone who asks for one. They are similar in content to the conference without the dialogue.

Be very clear with parents:

1. A parent can elect to receive an end-of-the-year report
2. A parent can elect to have a conference
3. A parent can elect to have both!

If a parent does *not* have a conference, they *must* get an end-of-the-year report. In other words, some parents will have both, some parents will have only a conference, and some parents will have only a report.

Keep and turn in a check-off sheet to keep track of parent responses.

P.S. from the author . . .

Since it is not possible to totally eliminate the *personal nature* of our observations, a formal recordkeeping system can only minimize its influence. Purely *objective* records are impossible to keep; it is *always* necessary to maintain a skepticism about what you have "seen" and recorded.